

Consumer-Directed Services and Services Facilitation under the ID Waiver


Provider Training Module 12

Division of Development Services
Department of Behavioral Health and Developmental Services
2013

ID Waiver Provider Modules

- 1 = Overview of the ID and DS Waivers
- 2 = Becoming a n ID Waiver Provider
- 3 = Supporting People in the ID and DS Waivers
- 4 = Introduction to Planning
- 5 = Residential Services
- 6 = PA, Respite and Companion (Agency-Directed)
- 7 = Employment and other Day Services
- 8 = Crisis Stabilization – ID Waiver
- 9 = Assistive Technology, Environmental Modifications and Transition Services
- 10 = Skilled Nursing
- 11 = Personal Emergency Response System
- 12 = Consumer Directed Services and Services Facilitation**
- 13 = Therapeutic Consultation
- 14 = Service Authorization and Reimbursement
- 15 = Monitoring and Oversight

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STOP

Review before proceeding

Overview of the Intellectual Disability and Day Support Waivers	Provider Training Module 1
Becoming an ID Waiver Provider	Provider Training Module 2
Supporting People in the Intellectual Disability and Day Support Waivers	Provider Training Module 3
Introduction to Planning in Virginia's Intellectual Disability and Day Support Waivers	Provider Training Module 4

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Common Acronyms

- CD = Consumer-Directed
- DDS = Division of Development Services
- CSB = Community Services Board
- SF = Services Facilitator
- SC = Support Coordinator
- PCP = Person-centered Practices
- IDOLS = Intellectual Disability Online System
- CRC = Community Resource Consultant
- EOR = Employer of Record

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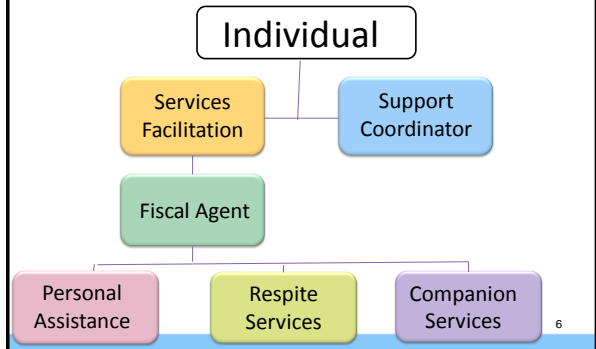
CD Services

This module covers. . .

- Service Description
- Provider Qualifications
- Allowable Support Activities
- Additional Requirements
- Units and Limitations
- Documentation

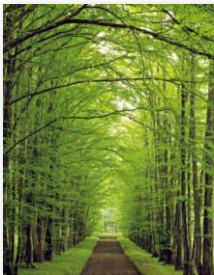
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CD Services



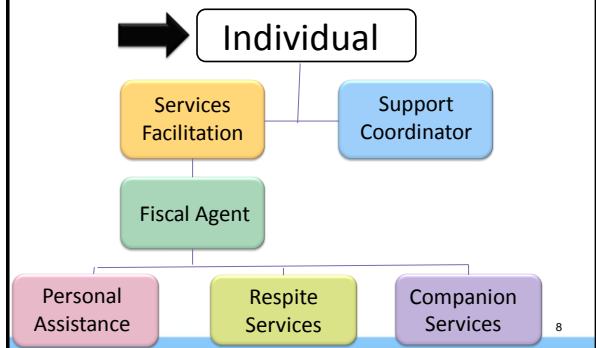
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Service Descriptions



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Individual



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Individual/EOR

The Individual* is the EOR.

*or someone acting on his/her behalf

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CD Service Description

The individual is the employer-of-record (EOR) and is responsible for hiring, training, supervising, and firing. There are three consumer-directed (CD) services.



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Employer of Record

Individual/EOR

Advertises
Interviews
Hires
Trains
Supervises
Fires

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Employer of Record



Individual* (18+)
Guardian
Family Member
Authorized Rep
Caregiver

*or someone acting on his/her behalf

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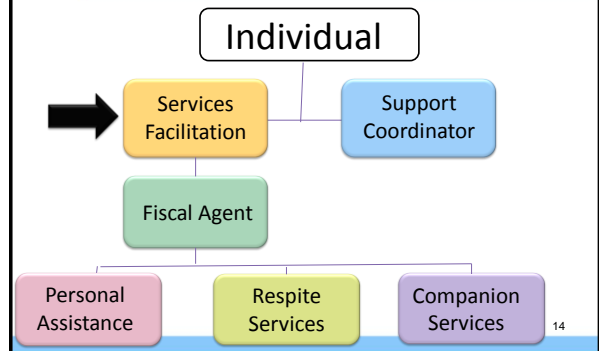
Employer of Record



SF
CD Attendant
SC
Individual (<18)

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Services Facilitation



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Service Description

Services Facilitation

Supports individual and family be the employer to....

- arrange
- direct, and
- manage their own services.



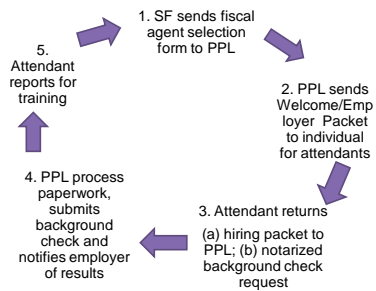
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Criminal Record Checks

Background check required
for all waiver providers per
July 2013 ID Waiver
regulations.

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Attendant hiring process



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Services Facilitation

What's expected?

comprehensive Visit
Plan Development
Management Training
Monitoring

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Services Facilitation

Types of SF visits

Comprehensive Visit (#H2000)

- One time only

On-Site Visits (#99509)

- One each month in first 60 days and then as determined at least every 6 months

Update visits ("Reassessment Visits") (#T1028)

- Annually

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Services Facilitation

Makes Initial Comprehensive home Visit (#H2000)

Completes assessments

Reviews Patient Pay, if needed

Helps develop job descriptions

Completes PFSS

Distributes **Employer Manual** to individual/family; may begin reviewing initial chapters

SF Steps

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Services Facilitation

Makes routine On-Site Visits (#99509)

Assess appropriateness of CD Services

Determine if any changes are needed

Alert SC (and LDSS) to any health and safety issues, if needed

Review medical conditions

Review timesheets

SF Steps

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Services Facilitation

Makes annual update visit (#T1028)

Prior to end date of current ISP

Update Parts I and II of the PC ISP

Evaluate any needed changes in CD services

Provide to SC to jointly develop the annual PC ISP, along with the individual/family

Complete new ISAR(s) via IDOLS

Document visit and file in individual's record

SF Steps

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Services Facilitation

Types of SF training provided

Employer Management Training (#S5109) - initial

Management Training (#S5116) - as needed



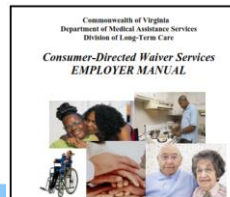
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Services Facilitation

Employer Management Training (#S5109) - initial

Complete review of the **Employer Manual** with individual/family

http://www.dmas.virginia.gov/Content_attachments/ltc/ltc-wvr_mf2.pdf



**Needed within 7 days
of authorization.**

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Services Facilitation

Management Training (#S5116) - as needed

For example:

- a. Manual review,
- b. conflict resolution,
- c. new training needs

Also includes reimbursement for:

Annual attendant TB Screening

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Services Facilitation

SF Monitoring

Non-billable unless part of a routine visit and includes:

- a) counseling or training individual re: responsibilities as an employer
- b) completing any needed changes to plan for support/ISAR and forwarding to the SC
- c) helping to hire new employees when needed, etc.
- d) counseling or training employees re: plan for supports implementation

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Services Facilitation

SF Availability

The SF must be available during normal workday hours by telephone to the individual receiving CD services.



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Services Facilitation

SF Attendance at meetings

Communicates with the CSB SC re: services

Contributes to the PC ISP through contact with the CSB SC and individual/family

Attends the annual planning meeting at the request of the individual

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Services Facilitation

If an individual changes SFs, the new SF must complete a **reassessment visit** in lieu of a comprehensive visit.



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Services Facilitation

Reminder ---
Guidance available



SF Steps

8/27/13 rev

ID Waiver Consum

#	Enroll
1	Determine if qualified/have resources, transportation, etc. Facilitator (SF) (<i>ID Community</i> http://websrvr.dmas.virginia.gov) Can be an individual or an agency
2	If one meets ID Waiver CD-SF provider of these services and Consumer-Directed Service F ACS Provider Enrollment Help Phone - 804-270-5105 or 888 Fax - 804-270-7027 or 888-33 Or electronically by: https://www.virginiamedicaid.com
3	Receive an approved Provide

Services Facilitation

May NOT be...



- The individual
- The individual's support coordinator
- If a minor, the parent of the individual
- The individual's spouse
- Anyone acting as employer on behalf of the individual

SF Steps

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Services Facilitation

Support Coordinator **or** Services Facilitator recommends the discontinuation of CD services if it is determined that the services cannot be appropriately managed or provided.

Examples



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Services Facilitation

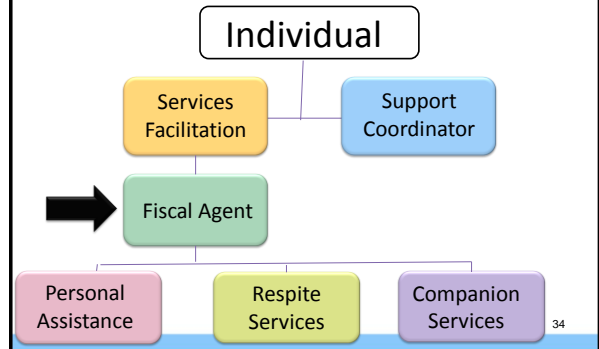
Examples

- 90 days without SF duties being completed
- supports that cannot be met by CD services
- identification of abuse or neglect
- inability to maintain staff
- existing CD employees can not meet needs
- no feasible back-up plan

Agency-directed services would be offered at these times.

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Fiscal Agent



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Service Description

Fiscal Agent: Public Partnerships, LLC (PPL)
 Processes hiring paperwork and background checks
 Pays the employee, withholding state and federal taxes
 Pays FICA, FUTA and SUTA benefits to State/Federal Government

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Fiscal Agent

PPL Phone: 1-866-259-3009

Mail: Public Partnerships, LLC

Attn: DMAS Consumer-Directed Services Program
 4991 Lake Brook Drive, Suite G90
 Glen Allen, VA 23060

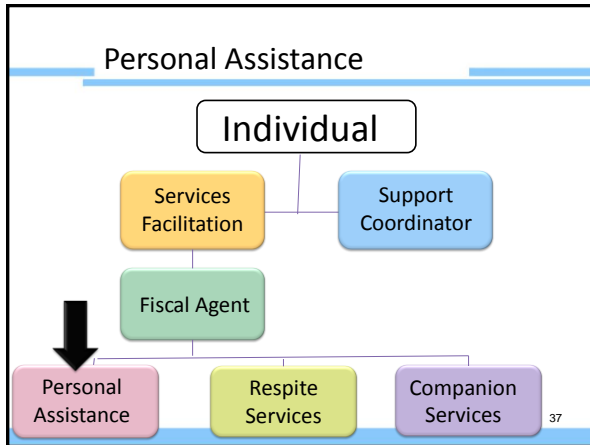
Electronic Timesheets:

<https://fms.publicpartnerships.com/pplportal/Login.aspx?vadmas>

Fax:

Administrative Fax: 1-866-709-3319; Timesheet Fax: 1-888-564-1532

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Personal Assistance

Direct support with personal needs, typical daily tasks, community involvement and health & safety.

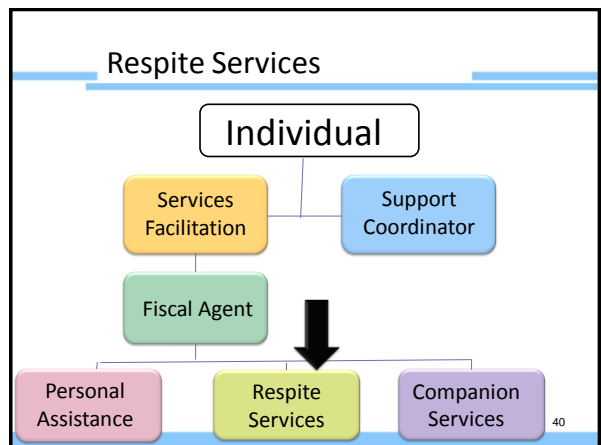
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Personal Assistance

PA

- Provides 1:1 support with...
 - personal needs,
 - positive relationships,
 - community involvement and
 - medical supports.

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Respite

Provides temporary supports during emergencies and at other times as needed by an unpaid caregiver.

Can be in the individual's home, a provider's home or other community locations.

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Respite

R

- Provides 1:1 support with...
 - personal needs,
 - positive relationships
 - community involvement and
 - medical supports



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Nurse delegation

PA R

Personal Assistance or
Respite Services
Plan for Supports can have
certain **medical supports**



That must be delegated . . .



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Nurse delegation

PA R

RN (or one licensed to practice medicine):

- Determines tasks to be delegated
- Assesses skill levels
- Trains specifically for each individual, per procedure
- Supervises performance of task
- Determines frequency of supervision



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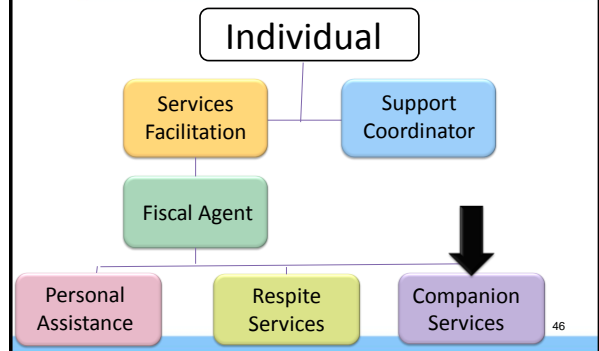
Nurse delegation

PA R

- RN training and on-going supervision activities can be paid for under ID Waiver Skilled Nursing, if the provider is a DMAS SN enrollee and prescribed by a physician
- Must also be preauthorized by PA Consultant

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Companion Services



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Companion

Provides non-medical care, socialization, or support to adults. This service is provided in an individual's home or at various locations in the community.

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Companion

C

- Provides 1:1 support with...
 - positive relationships and
 - community involvement.

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Allowable Support Activities

Allowable Support Activities	Personal Assistance	Respite	Companion
ADLs	Yes	Yes	No
IADLS	Yes	Yes	Yes
Monitoring health/Medical needs	Yes	Yes	No
Medications	Yes	Yes	Yes Self-Admin*
Housekeeping /Meals**	Yes	Yes	Yes
Safety	Yes	Yes	Yes
Delegated Nursing Tasks	Yes	Yes	No
Appointments/Meetings	Yes	Yes	Yes

Units & Limitations



Units & Limitations

PA R C

These services

Do not include "skill-building."

Provide supports 1:1

Occur in home and community

Can be combined with AD Services

Have units of service = 1 hour

Units & Limitations

PA R C

When sharing authorized hours between no more than two individuals in the same home...

- total hours are divided
- must be justified and described in PFSs
- this is an exception rather than a “rule”

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Units & Limitations

PA

Personal Assistance

- No set hourly limit
- Plan for Supports based on documented support needs
- Can be provided along with In-Home Residential, but not during the same hours

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Units & Limitations

PA

Personal Assistance

- Not allowable with congregate residential or licensed ALF.
- Not during same billable hours as other Waiver services.

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Units & Limitations

PA

Personal Assistance

Not for school-age individuals, during school hours



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Units & Limitations

PA

Personal Assistance



May be provided during work or post-secondary education under certain conditions.



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Units & Limitations

PA

Personal Assistance



Allowed during same hours as Supported Employment or post-secondary school if individual needs ADL support.

CAUTION!!

- Must not duplicate Supported Employment support activities
- Prohibited if required by employer to provide

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Units & Limitations

PA

Personal Assistance

Ineligible without a back-up plan



...must be identified in the Plan for Supports.

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Units & Limitations

PA

Personal Assistance

Back-up plan is the responsibility of individual/family

This plan may include a family member, primary caregiver, neighbor, friend who substitutes when the CD employee is unavailable.



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Units & Limitations

R

Respite

- Follows ISP dates
- Authorized via fiscal year – July-June
- Individual present during hours to be billed

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Units & Limitations

R

Respite

Only for unpaid
caregivers



...who live in the home.

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Units & Limitations

R

Respite

Restricted To:

480 hrs per fiscal year –
(July – June)

Agency or Consumer Directed
or Combination of both

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Units & Limitations

C

Companion

Does not provide medical
or personal needs

Only for adults over 18

No more than 8 hours
per day



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Units & Limitations

C

Companion

Required to have a stated reason for the companion to accompany the individual

Therapeutic outcome
required



Support
with IADLs

Example

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Units & Limitations

C

▪ **Therapeutic Support** = Charles and his companion go to the YMCA swimming class every Wednesday **to help Charles understand the instructions.**

▪ **Non-Therapeutic Support** = Charles and his companion play pool every Wednesday at the YMCA.

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Units & Limitations

C

Congregate Residential Support (CRS)
and
Companion

AN OPTION



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Units & Limitations

C

Congregate Residential Support (CRS) and
Companion



CRS hours may need to be reduced
by the hours that will now be
Companion services.

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Units & Limitations

PA R C

Services to Two Individuals in Same Home

Employee hours shared by no more than 2 individuals within any given shift

Each individual's needs assessed

Simultaneous support hours combined

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Units & Limitations

PA R C

Example

Jane – bathing, dressing & restroom = **3** hours

Ann – bathing & dressing = **2** hours

Jane and Ann shared hours for housekeeping,
laundry and meal prep = **4** hours

Total Billable Weekly Hours? _____

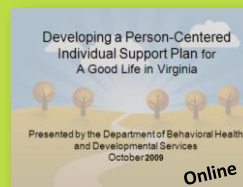
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Documentation



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Review the five PC ISP Modules on the DBHDS Website before participating in an individual's planning meeting.



<http://www.dbhds.virginia.gov/ODS-PersonCenteredPractices.htm>

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Documentation

Services Facilitation

Obtains from the CSB SC...

- 1) Completed consent to exchange information
- 2) Supports Intensity Scale (Long Report)
- 3) PC ISP Parts I through IV
- 4) May request copy of written notice of designated collector of patient pay



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Documentation

Services Facilitation

The DMAS 225 (and written notice if designated collector of patient pay) is sent by the CSB SC to the EOR.

If the individual must pay toward his/her Medicaid services (i.e. Patient Pay), the SF is available to discuss the individual's obligation to pay the DSS-determined amount to a CD employee.

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Documentation

Services Facilitation

Completes and sends to the CSB SC...

- 5) Plan for Supports (PFS) Part V based on the Shared Plan (Part III)

Option for PA

Personal Preferences Tool

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Documentation

PA

Personal Assistance Option

Periodic Supports

- Additional hours of support over and above regularly scheduled hours
- Completed initially and as needed
- Included in the PFS
- To accommodate semi-predictable events

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Documentation

PA

Periodic Support Hours (cont'd)

- PFS must include an outcome and support activities to be provided during additional hours
- Computed through form: Determining Periodic Support Hours

Cannot bill for PS hours unless used/documented

Determining Periodic Support Hours

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Documentation

PA

Periodic Support Hours (cont'd)

- Documentation on timesheet:
 - Date PS hours used
 - Number of PS hours provided
 - Reviewed by the SF

PS Checklist

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Documentation

PA

R

C

- 6) ISAR via IDOLS (see Provider Training Module 2)

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Documentation

PA

R

C

- 8) Updates to PFS
- 9) Signatures of individual/EOR and DSP confirming delivery of supports on timesheet

For more information on timesheets see the PPL Web Portal Instruction Manual at:

<https://fms.publicpartnerships.com/pplportal/Login.aspx?vadmas>

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Documentation

PA

C

- 11) SF completes and sends to CSB SC
Person-Centered Reviews every 90 days*

10 day grace period allowed

*See Chapter IV of the IDCSM for required
quarterly review elements.

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Documentation

R

11) Person-Centered Reviews *(continued)*

Respite Only

- Written Person-Centered Reviews are not required
 - Regular communication (e.g. quarterly) is required to inform the CSB SC about the use of Respite Services

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Continue to modules...



Service Authorization and
Reimbursement

Provider Training
Module 14

Monitoring and Oversight

Provider Training
Module 15

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Contacts:

Community Resource Consultants				
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Division of Development Services
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